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AMENDMENT #2 – 12/10/2004
REQUEST FOR PROPOSALS (RFP)
ADVERTISING, MARKETING AND PUBLIC RELATIONS SERVICES
FOR TAM PROGRAMS
Project No. F10R5200095

Ladies/Gentlemen:

This Amendment #2 is being issued to amend and clarify certain information contained in the above referenced RFP. All information contained herein is binding on all offerors who respond to this RFP. Specific parts of the RFP have been amended. The following changes/additions are listed below; new language has been double underlined and marked in bold (i.e., **word**) and language deleted has been marked with a strikeout (i.e., ~~word~~).

1. REVISE: "KEY INFORMATION SUMMARY SHEET":
Closing Date and Time: December ~~3~~**23**, 2004 - 2:00 PM Local Time
2. REVISE: SECTION 1.10, Proposals Due (Closing) Date:

An unbound original and five (5) bound copies of each proposal (technical and financial) must be received by the Procurement Officer, at the address listed in Section 1.6, no later than 2:00 PM (local time) on December ~~3~~**23**, 2004 in order to be considered. An electronic version (diskette or CD) of the Technical Proposal in MS Word format must be enclosed with the original technical proposal. An electronic version (diskette or CD) of the Financial Proposal in MS Word format must be enclosed with the original financial proposal. Insure that the diskettes are labeled with the RFP title, RFP number, and Offeror name and packaged with the original copy of the appropriate proposal (technical or financial).

3. REVISE: SECTION 1.20, Offeror Responsibilities:

The selected Offeror shall be responsible for all products and services required by this RFP. All Subcontractors shall be identified and a complete description of their role relative to the proposals must be included in the Offeror's proposals. ~~If an Offeror that seeks to perform or provide the services required by this RFP is subsidiary of another entity, all information submitted by the Offeror, such as but not limited to, references and financial reports, shall pertain exclusively to the Offeror, unless the parent organization will guarantee the performance of the subsidiary. If applicable, the Offeror's proposal~~

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must contain an explicit statement that the parent organization will guarantee the performance of the subsidiary.

4. REVISE: SECTION 1.28, Non-Visual Access:

1.28 — Non Visual Access

By submitting a proposal, the Offeror warrants that the information technology offered under the proposal (1) provides equivalent access for effective use by both visual and non-visual means; (2) will present information, including prompts used for interactive communications, in formats intended for both visual and non-visual use; (3) if intended for use in a network, can be integrated into networks for obtaining, retrieving, and disseminating information used by individuals who are not blind or visually impaired; and (4) is available, whenever possible, without modification for compatibility with software and hardware for non-visual access. The Offeror further warrants that the cost, if any, of modifying the information technology for compatibility with software and hardware used for non-visual access will not increase the cost of the information technology by more than five percent. For purposes of this RFP, the phrase “equivalent access” means the ability to receive, use and manipulate information and operate controls necessary to access and use information technology by non-visual means. Examples of equivalent access include keyboard controls used for input and synthesized speech, Braille, or other audible or tactile means used for output.

5. REVISE: SECTION 2.3, General Requirements:

2.3.3 Not charge for travel or living expenses to and from the base location of operations for performance under this contract which is 301 West Preston Street, Baltimore, MD 21201 to the contractor’s site will be reimbursed. **The selected Contractor will be required to attend monthly meetings at a site chosen by DBM/TAM. Typically meetings are held at the Maryland Relay Center in Baltimore, the selected Vendor’s location or the State Office Complex in Baltimore.** Non-routine travel will be identified within a P.O., if appropriate and will be reimbursed according to the State’s travel regulations and reimbursement rates. See the Department’s web site and select Reimbursement Limits or Travel Regulation at:

http://www.dbm.maryland.gov/portal/server.pt?space=Dir&spaceID=7&parentname=CommunityPage&parentid=0&in_hi_userid=1332&control=OpenSubFolder&subfolderID=3790&DirMode=1

<http://www.dbm.maryland.gov>

Click on Other Services, State Travel Management Services and then Travel Regulations.

2.3.6 Comply with and adhere to the Maryland State IT Security Policy and Standards. These policies may be revised from time to time and the Contractor shall comply with all such revisions. Updated and revised versions of the Maryland State IT Policy and Standards are available on line. See Department of Budget & Management website for details. Select IT Security Policy and Standards

http://www.dbm.maryland.gov/portal/server.pt?space=Dir&spaceID=7&parentname=CommunityPage&parentid=0&in_hi_userid=1332&control=OpenSubFolder&subfolderID=3790&DirMode=1

6. REVISE: SECTION 2.4, Service Requirements:

~~2.4.1 If requested, provide website design, program implementation and content maintenance for the Maryland Relay's website.~~

7. REVISE: SECTION 2.5, Staffing Requirements:

~~2.5.2 The Contractor must assign individual staff to fulfill the function of Account Executive for day-to-day contact. The Account Executive must possess the noted skills and be responsible for the following:~~

- ~~A. Account team leadership. The Contractor must assign an account service leader experienced in marketing communications disciplines and practices, with an ability to communicate clearly and in a timely manner with DBM/TAM staff and the Contractor's staff members of the account team.~~
- ~~B. They must become familiar with Maryland Relay, the products and features offered, and all the diverse populations served and committed to all aspects of the account.~~
- ~~C. Resource management skills, as well as ability to inspire "best work possible" from these resources (e.g., creative, media, production, research).~~
- ~~D. Familiarity with consumer product marketing dynamics.~~
- ~~E. Budget consciousness and management skills. The Account Executive must pay continuing attention to production costs and cost controls to maximize quality consistent with budgetary constraints.~~
- ~~F. Clear presentation of ideas, as well as listen and respond.~~
- ~~G. Experience working with individuals with disabilities.~~
- ~~H. Identifying and developing resources within Maryland.~~

2.5.23 Availability of Key Personnel. Vendors shall ensure the personnel identified, as key shall be available to perform Contract requirements. Contractor key personnel shall not be reassigned to another task without written concurrence of the Contract Manager. If any key personnel leave the employment of the Contractor, or are approved for reassignment by the Contract Manager, the replacement must have equal or better qualifications than those listed in 2.6 and be approved by the State Contract Manager as outlined in Section 2.5.6~~3~~.

2.5.34 Substitution of Key Personnel. During the first 180 calendar days of the Contract performance period, no substitutions of key personnel will be permitted unless such substitutions are necessitated by extraordinary circumstances such as sudden illness, death, or as otherwise approved by the State Contract Manager. In any of these events, the Contractor shall promptly notify the State Contract Manager and provide the information required by Section 2.5.6. **All requests for substitutions must provide a detailed explanation of the circumstances necessitating the proposed substitution, a narrative of the proposed substitute, and any other information requested by the**

State Contract Manager to make a determination as to the appropriateness of the proposed substitution. All proposed substitutes must have educational qualifications and work experience equal to or better than the resume initially proposed for key personnel; the burden of illustrating this comparison shall be the Contractor's. After the initial 180 calendar day period, all proposed substitutions of key personnel shall be submitted in writing, at least 15 business days in advance of the proposed substitution, to the State Contract Manager, ~~with the information required in Section 2.5.6.~~ The State Contract Manager must agree to the substitution in writing before such substitution shall become effective.

~~2.5.5 **Availability of Other Personnel.** Individuals assigned and accepted as personnel for the tasks within this Contract are expected to remain dedicated to the assigned Purchase Order for the duration of the task. Substitutions will be allowed only when the State Contract Manager specifically agrees to the substitution in writing.~~

~~2.5.6 **Substitution of Other Personnel.**~~

~~A. All proposed substitutes of personnel shall have the qualifications at least equal to that of the person initially proposed by the Offeror and evaluated and accepted by the State Contract Manager. The burden of illustrating this comparison shall be the Contractor's. The resumes of the initially assigned personnel shall become the minimum requirement for qualifications for the duration of the total Contract term. If one or more of the personnel are unavailable for work under this Contract for a continuous period exceeding 15 calendar days, the Contractor shall immediately notify the State Contract Manager and propose a replacement with personnel of equal or better qualifications within 15 calendar days of notification. All substitutions shall be made in accordance with this provision.~~

~~B. All requests for substitutions must provide a detailed explanation of the circumstances necessitating the proposed substitution, a resume of the proposed substitute, and any other information requested by the State Contract Manager to make a determination as to the appropriateness of the proposed substitution. All proposed substitutes must have educational qualifications and work experience equal to or better than the resume initially proposed for key personnel; the burden of illustrating this comparison shall be the Contractor's.~~

~~Resumes shall be signed by all substituting individuals and their formal supervisor, and the official resume of the previous employee shall be provided for comparison purposes.~~

8. REVISE: SECTION 2.6, Labor Categories:

All persons filling the classifications listed below shall have a minimum of two (2) years' experience in their respective category **and at a minimum, shall perform the following (note, proposed individuals can fill more than one labor category):**

- A. **Account Executive:** Assist in the strategic development of marketing and advertising decisions with the client. Including the overall day-to-day responsibility of all work being done by the Contractor on the client's behalf. Maintain and/or coordinate the proper recording and production of all records pertaining to the State's procurement regulations.
- B. **Public Relations Manager:** **Find or assist in the creation of Public Relations opportunities, write and send press releases as appropriate.**
- C. **Creative Director (Print & Broadcast):** Coordinate with the Account Manager, to ensure that all creative production meets the overall objectives of the marketing and advertising campaigns **demonstrating sensitivity to individuals with disabilities.**
- D. **Media Planner and buyer:** **Coordinate and negotiate placement of media to meet the goals of the marketing plans.**
- E. **Graphic Designer:** Oversight of the creation of materials **for print or publication** to meet the objectives of the contract.
- F. **Copywriter:** **Edit existing written materials, write copy as requested for quarterly newsletter and any other articles as needed.**
- G. **Traffic Controller:** **Provide administrative support to ensure that all work products move efficiently.**
- H. **Production Manager:** **Execute any collateral, promotional items, specialty items or printed materials to include developing estimates.**

9. REVISE: SECTION 3.4, Volume I – Technical Proposal:

3.4.1 Transmittal Letter

A transmittal letter shall accompany the Technical Proposal. The purpose of this letter is to transmit the proposal and acknowledge the receipt of any addenda. The transmittal letter should be brief and signed by an individual who is authorized to commit the Offeror to the services and requirements as stated in this RFP. See Offeror's responsibilities in Section 1.204.

3.4.5 Executive Summary

The Offeror shall condense and highlight the contents of the Technical Proposal in a separate section titled "Executive Summary". The summary shall also identify any exceptions the Offeror has taken to the requirements of this RFP, the Contract (Attachment A), or any other attachments.

~~WARNING: Exceptions to terms and conditions may result in having the proposal deemed unacceptable or classified as not reasonably susceptible of being selected for award.~~

3.4.6 Offeror Experience and Capabilities

Offerors shall include information on past experience with similar projects. Offerors shall describe how their organization can meet the qualifications of this RFP and shall include the following:

3.4.6.1 An overview of the Offeror's experience and capabilities rendering services similar to those included in this RFP. This description shall include:

- A. ~~Corporate~~ Organization size, length of time the organization has been providing the services, key business partners, and the number of employees dedicated to providing the services;
- B. A comprehensive description of the Offeror's experience in supplying the services requested by this RFP;
- C. ~~Experience relative to the proposed staff having demonstrated~~ **Experience demonstrating** knowledge of individuals with disabilities ~~for the purpose of advertising, marketing research, strategic planning, public relations and graphic design;~~
- D. ~~A list of government entities and non-profit organizations that have been clients of this firm;~~

DE. List of active Public Relations clients by agency billing ~~gross annual sales;~~ and

F. The Contractor shall prepare a simulated marketing and strategy plan for a six-month period using a budget of \$75,000 targeting the senior population. This plan will include detailed marketing strategy, public relations plan and budget for the prescribed time period. See section 3.4.8.1;

~~G. Documentation of a successful media buy for a client including value added or promotional opportunities related to media outlets, and special events.~~

~~H. The Offeror must provide addresses of 3 websites that your firm has developed.~~

3.4.6.2 Samples of the following must be provided:

- A. Three (3) examples of campaigns completed for a client with a budget under \$300,000 per year performed within the last five (5) years, with the following information provided for each project: Point of Contact Name and Phone Number, Dates of Performance, Contract Value, Type of Contract, Brief Description of Services & Products Provided.
- B. Samples of previous work including a newsletter, video, direct mail piece and print ad
- C. ~~Documentation of a successful media negotiation including value added promotions for a non-profit organization or government entity.~~ **Narrative and collateral of a Public Relations Campaign.**
- D. Provide, upon request, a prior period of a flight of media placement and planning operation to provide all media placement in conjunction with a marketing objective including, but not limited to purchase or placement of media space regionally, media planning and research, spot trafficking and shipping, flight

monitoring and maintenance, spot and station reconciliation for an organization serving individuals with disabilities.

3.4.7 Personnel

The Offeror shall describe its personnel capabilities in compliance with Section 2. ~~Resumes~~ Narratives shall be provided for all personnel proposed for this RFP.

3.4.8 ~~Offeror Technical Response to RFP Requirements~~ Marketing and Strategy Plan

~~The Offeror shall address each major task in the Technical Proposal and describe how the proposed services will meet the requirements as described in the RFP. If the State is seeking Offeror agreement to a requirement, the Offeror shall state agreement or disagreement. As stated above, any exception to a term or condition may result in having the proposal deemed unacceptable or classified as not reasonably susceptible of being selected for award. Any paragraph that responds to a work requirement shall include an explanation of how the work will be done.~~

Using a budget of \$75,000 a Marketing and Strategy Plan which includes:

- A. Target audiences for six month time period;
- B. Ideas to reach each target audience and method to accomplish goals;
- C. Schedule of print media plan, including publications, number of placements, total cost of media;
- D. Collateral that needs to be developed including printing prices; and
- E. Estimated budget for each media plan, including direct mail postage, creative development, and production costs.

10. REVISE: SECTION 3.4.9 Economic Benefits:

~~The Offeror shall describe the benefits that will accrue to the State of Maryland economy as a direct or indirect result of the Offeror's performance of the Contract resulting from this RFP. The Offeror will take into consideration the following elements. (Do not include any detail of the financial proposals with this technical information):~~

- ~~A. The estimated percentage of Contract dollars to be recycled into Maryland's economy in support of the Contract, through the use of Maryland subcontractors, suppliers and joint venture partners. Offerors should be as specific as possible and provide a percentage breakdown of expenditures in this category.~~
- ~~B. The estimated number and types of jobs for Maryland residents resulting from this Contract. Indicate job classifications, number of employees in each classification, and the aggregate Maryland payroll percentages to which the Contractor has committed at both prime and, if applicable, subcontract levels.~~
- ~~C. Tax revenues to be generated for Maryland and its political subdivisions as a result of this Contract. Indicate tax category (sales tax, inventory taxes and estimated personal income taxes for new employees). Provide a forecast of the total tax revenues resulting from the Contract.~~
- ~~D. The estimated percentage of subcontract dollars committed to Maryland small businesses and MBEs.~~

11. REVISE: SECTION 4.2 Technical Criteria:

~~Approach to satisfying the Work Requirements~~
Offeror Experience and Capabilities
Personnel Proposed
Marketing and Strategy Plan
~~Economic Benefit Factors~~

12. REVISE: ATTACHMENT A:

Attachment A has been revised and is attached to the RFP via this addendum.

Should you require clarification of the information provided in this addendum, please contact me at (410) 260-7191 as soon as possible.

Date Issued: December 10, 2004

By _____
Susan Woomer
Procurement Officer